



Cu Mira pa Futuro

*A Destination Development Plan
for Aruba*

2017 - 2021





Thank You!

We are pleased to present the Aruba Destination Development Plan 2017 - 2021 (hereinafter referred to as DDP or "Cu Mira Po Futuro") to our partners and the Aruban community.

Aruba Tourism Authority (A.T.A.) would like to sincerely thank everyone who contributed to the development of the DDP 2017-2021. Along with an extensive group of stakeholders who contributed their knowledge and expertise during various sessions in September 2016 through April 2017, the Aruban community provided valuable insights and recommendations that shaped the DDP Action Plan.

The Action Plan included in this report is the result of an interactive, open, and participatory process from which we gathered incredible support from those who contributed their time.

We look forward to working with our partners and the Aruban community toward becoming a "sensible boutique destination that inspires curiosity."

With much gratitude and appreciation,

Ronella Tjin Asjoe-Croes
CEO, Aruba Tourism Authority



“A ris
lifts

A photograph of a tropical coastline. In the foreground, a gnarled, weathered tree with sparse green leaves stands on a rocky, coral-strewn shore. The water is a vibrant turquoise color, and the sky is a clear, bright blue. A white diagonal banner is overlaid on the bottom left corner, containing the text "ing tide" and "all boats".

ing tide
all boats”



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THE

BIG PICTURE

- 1.1 *Destination Development Plan*
- 1.2 *As a General Matter*
- 1.3 *A.T.A. Role*
- 1.4 *Cu Mira pa Futuro*



THE BIG PICTURE

1.1 Destination Development Plan

We are living in exciting but complex times. The tourism industry has reached a new frontier where globalization and technological advancements are driving an unprecedented shift in thinking and consumer needs.

We are witnessing the birth of a new traveler who sees the world through a different lens and embraces different lifestyles compared to the traditional Aruba visitor of the past 30+ years.

These transformations, coupled with the fact that Aruba's tourism product is mature, means it is time to reflect on what we have achieved over the past decades and look ahead to where we want to go.

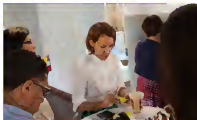
True to our pioneering mindset, it is time to consider a new approach toward destination development to maintain our leading position in the industry and to strengthen the foundation of Aruba.

Doing so will position Aruba as a forward-thinking destination for years and generations to come.

Considering these shifts, A.T.A. found it imperative to re-assess strategic priorities as a destination in order to

continue on a smart path for sustainable destination development.

In this regard, as outlined in A.T.A.'s Business Plan 2014-2017 and formulated as a strategic priority in its 2016 Corporate Plan, A.T.A. in collaboration with its partners and the Aruban community has developed a DDP, aptly named "Cu Mira Pa Futuro".



A pragmatic framework

DDP Process

ATA MISSION:

To increase the share of affluent travelers and the economic value of tourism for the benefit of our community and our stakeholders by positioning and developing Aruba as their preferred caribbean destination.

DDP MISSION:

To formulate a pragmatic framework for innovative and sustainable destination development to the benefit of the community and the visitor.



rk for innovative and sustainable destination development.



THE BIG PICTURE

1.2 As a General Matter

1.2.1 Characteristics of a DDP



Provides a framework



Identifies opportunities



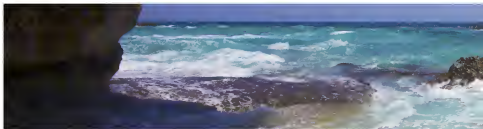
Establishes clear actions and focused priorities



Delivered by both private and public stakeholders



Carried out over a stated period of time



1.3 A.T.A. Role

A.T.A. has incorporated those actions from the DDP which are in line with its scope and objectives into its Strategic Business Plan 2017 - 2021. Regarding recommended actions that are not within A.T.A.'s scope (directly or indirectly) but impact the overall visitor experience, A.T.A. may seek to play an advocacy role. This approach will lead to greater alignment between the Aruba brand promise and the visitor experience, in other words, increased value for money.

1.4 Cu Mira pa Futuro

A pragmatic framework for innovative and sustainable destination development to the benefit of the community and the visitor.

In other words...



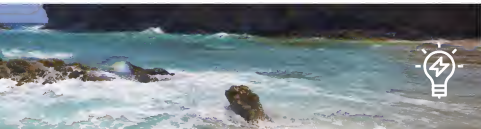
COMMON VISION
Based on consensus



PRACTICAL FRAMEWORK
Guiding document for stakeholders



ACTION PLAN
Road Map







EXECUTIVE SUMMARY

- 2.1 *Action Plan Highlights*
- 2.2 *Common Vision*
- 2.3 *Curiosity*



Executive Summary

The DDP is a strategic framework for destination development that will be used to guide both strategic and policy decisions affecting Aruba.

The plan provides a cohesive approach to destination development. A proper execution of the plan will ensure a focused, consistent, and proactive approach by government and non-government stakeholders for the development of destination Aruba over the next 4 years and beyond. The DDP leverages the wealth of data and research conducted by A.T.A. and stakeholders over the past decades, while providing an innovative outlook on the future of the destination.

The DDP allows A.T.A. and its stakeholders to go forward with a renewed sense of purpose and a refreshed perspective by challenging assumptions and eliminating dated habits. Our approach to the future cannot be based upon our past successes, as it will not guarantee similar results in the future.

The DDP offers a fresh approach for collaborative destination development. This new methodology is grounded in creative thinking and imagination, triggered by curiosity of the visitor and the community.

Strategic Framework

The process resulted in five Strategic Objectives which will be carried out through 22 Development Priorities with 90+ specified actions. The Development Priorities and corresponding DDP actions are co-dependent and jointly lead destination Aruba toward the common vision:

“Jointly working toward being a sensible boutique destination that inspires curiosity”

This sets the foundation for:

- i. Alignment*
- ii. Prioritization*
- iii. Decision-making*



STRATEGIC OBJECTIVES

BALANCED DEVELOPMENT:

Embracing a sensible approach toward destination development to safeguard the community's quality of life, protect the environment, and preserve natural and cultural assets.

- *Ensure a balanced capacity*
- *Enforcement of tourism development plans and standards*
- *Maintain socio-economic balance*
- *Bring awareness to sustainable tourism*
- *Enhance safety and security*
- *Protect and enhance cultural and natural assets*

INCREASE THE ECONOMIC VALUE OF TOURISM:

Enhancing the quality of the overall Aruba experience for the visitor by focusing on "value for money", which drives visitor spending and tourism receipt (contribution to the Aruba Gross Domestic Product (GDP)).

- *Enhance quality on-island experience*
- *Develop niche markets*
- *Remove bottlenecks on path to purchase*
- *Safeguard and enhance hospitality*
- *Enhance quality of product*

AMPLIFY SENSE OF PLACE:

Increasing the destination value by investing in product and programming that align with Aruba's place DNA. Cultivating cultural curiosity and pride through education and community engagement.

- *Increase presence and visibility of DNA in destination*
- *Beautify physical surroundings*
- *Increase awareness of culture and heritage*

DEVELOP AN INNOVATION MINDSET:

Fostering a culture of possibility and creativity amongst stakeholders and the younger generation. Applying an "innovation filter" to all new destination development projects and data collection.

- *Foster innovation and entrepreneurship*
- *Become a data intelligence-driven island*
- *Enhance digital communication and facilitate knowledge-sharing*

INCREASE COMMUNITY ENGAGEMENT:

Enhancing the connection between people and place through increased awareness and education of the community and stakeholders.

- *Increase awareness of sustainable tourism and product*
- *Strengthen alignment between communication and visitor expectation*
- *Activate local and international ambassadors*
- *Enhance on-island communication (B2C)*
- *Facilitate learning about tourism product and aspiration*



2.1 Action Plan Highlights

90+ concrete actions developed in collaboration with the local community and key stakeholders

The Action Plan is guided by our common vision to becoming a sensible boutique destination. It represents:

- *An implementation strategy balanced between Stability ('Preserve the Core') and Growth ('Stimulate Progress')*
- *A system for putting our aspirations into action*
- *A compass stakeholders can use to examine their internal strategies and guide future decisions to ensure that both align with the direction of destination Aruba*

The Action Plan will be implemented in three phases. The first phase will focus on establishing the foundation for destination development going forward, with the majority of the development projects and initiatives being rolled out in the second and third phases.

Each phase has its own distinct timing and deliverables and establishes the conditions for the next phase. The completion of each phase is a step on the way toward our common vision.

Given the continuous nature of destination development, several actions are of recurrent nature and/or will roll-over into subsequent phases.

Phase I Actions kicking off in 2017 and 2018:
Foundation and Guideline Development (p.88)

Phase II Actions kicking off in 2019:
Project Roll-Outs and Policy Implementation (p.102)

Phase III Actions kicking off in 2020 and 2021:
Project Roll-Outs and Policy Implementation (p.112)





DDP “Big Picture”

Value Proposition

01

Provides a decision-making framework to support cohesive destination development

02

Supports a common vision and direction for destination Aruba

03

Provides a proactive approach toward development and greater alignment in management of destination Aruba and the visitor experience

04

Fosters a collaborative approach for sustainable destination development

05

Helps maximize return on investment with respect to product development and marketing



06

Addresses fragmentation to help address better use and management of resources

07

Preserves Aruba's core assets while stimulating progress



08

Leads to greater alignment between visitor experience and expectation

09

Supports alignment with the UNWTO sustainable tourism goals linked to the United Nations 2030 Agenda, Sustainable Development Goals (SDGs), particularly, goals 8, 12 and 14 an inclusive and sustainable economic growth, sustainable consumption and production and the sustainable use of oceans and marine resources, respectively, and goal 17, partnerships for the goals





- *Collaborative process*
- *Stakeholders and community*
- *Maximize resources*
- *Integration*

2.2 Common

“Jointly working towards a boutique des inspires c



- *Quality over quantity*
- *Focus on specific market segment(s)*
- *Niche development*
- *DNA alignment*



- *Pragmatic approach*
- *Balanced destination management*
- *Reasonable actions*
- *Prudent decision-making*
- *Thoughtful planning*

ward being a **sensible** destination that curiosity”



- *To experience Arubo is to renew your relationship with the curious explorer within you*
- *A new traveler = the self-actualizer, active, enterprising, fulfillment*
- *Amplifying the Arubo DNA in product and programming*



2.3 Curiosity

At the core of Aruba's story is its DNA. Not to be confused with Aruba's brand, Aruba's DNA is the foundation from which the brand and tourism communication strategy flourish. The DNA speaks the truth about Aruba's culture, assets, traditions, and people (refer to Chapter 3 for the underlying DNA assessment).

The more the Aruba brand and communication strategy are aligned with the Aruba DNA from both A.T.A. and industry partners, the better the visitor experience.

Therefore, all actions in the plan have been vetted for DNA alignment to ensure a cohesive strategy that focuses on an improved visitor experience.





Why Curiosity?

Aruba is a destination where the community is defined by, and proud of, their instinctual sense of curiosity. This is rooted in the island's history of resilience, resourcefulness, and entrepreneurial thinking. It's ability to survive and to spur economic growth.

- *Curiosity stems from the Aruba DNA*
- *History has made us "curioso"*
- *Curiosity is at the center of key DNA attributes: diverse, resilient, creative, open-minded, entrepreneurial, forward-thinking, resourceful, big thinkers*
- *From a visitor perspective, the curiosity communication strategy focuses on: discovering insights, exploring, mindfulness, living a life that matters, and finding happiness through these things.*

"A place bursting with hidden gems that harvests free spirits, artists, entrepreneurs, creators, big thinkers, self-expressers, inventors and re-inventors. Aruba is where you go to awaken your curiosity."

How will Aruba curio



Memorable and Authentic Experiences

Curiosity will help preserve and enhance the Aruba sense of place and instill in the community, stakeholders, and entrepreneurs the creative confidence necessary to innovate, preserve the environment and tell the stories we want to share.

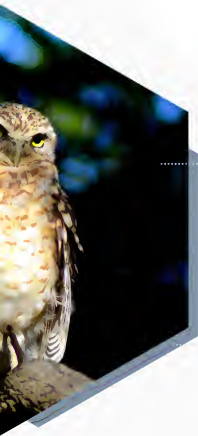


Amplifying the Aruban DNA

*“The very purpose
happiness”*



Aruba awaken curiosity?



Storytelling



Storytelling will stimulate experiential travel and unlock the untapped potential from our biggest asset:

The Aruban People.

Culture Visibility



*of life is to seek
~Dalai Lama*





THE

ARUBA DNA

- 3.1 *The DNA Assessment Process*
- 3.2 *The Aruba DNA*
- 3.3 *The Aruba Visitor*



THE ARUBA DNA

■ Chapter 3

As part of the discovery phase, A.T.A. undertook a destination DNA assessment to uncover Aruba's place DNA, its identity.

The DNA assessment was based on a self-assessment and independent third-party review of the DDP incubator and town hall findings (collective stakeholder and community feedback), as well as an independent assessment of visitor surveys, online feedback, and what Aruba projects (communication with visitors or target visitors - 'messaging').

The DNA assessment is an integral part of the DDP as it establishes the foundation for a strategic communication direction, in parallel with the development of potential new niches and visitor markets.

3.1 The DNA Assessment Process



*Stakeholder
Self-Assessment*



*Independent
Assessment*



*Stakeholder
Validation*



"This happy community welcomes both artists and creative minds, active types, true explorers seeking to be inspired, and families and friends who value meaningful connections and mindful living. Aruba invites people who want to get inspired and who want to experience the local way of life" - Destination Think!, independent DNA assessment 2017

What is a place DNA?



*The care identity of
your destination*



The sense of place



*The spirit of all experiences
and stories generated
from that place*



3.2 The Aruba DNA

INTANGIBLE

- *Colorful culture and flavorful cuisine*
- *Rich in history and stories*
- *Good Vibes*
- *Easygoing - Relaxed*
- *The Aruban way of life / vibe*
- *Peace of mind*
- *Approachable*
- *At home feeling*

OUR PEOPLE

- *Friendly*
- *Hoppy*
- *Warm and Welcoming*
- *One big family*
- *Connected, Proud, Young at heart,
Entrepreneurial, Free-spirited,
Creatives, Thinkers, Explorers, Resourceful*
- *Curious*



How will we strengthen alignment w

✓ *Working toward becoming a boutique destination*

✓ *Moving away from generic to more specific messaging*

✓ *Amplifying experiential alignment with DNA*

✓ *Dialing-down attributes not in DNA (cliches, casinos, ...)*



TANGIBLE

- *Beach Destination + Paradise Appeal*
- *Diversity in People, Art and Faad*
- *Flavorful cuisine*
- *Colorful infrastructure*
- *Alaë*
- *Papiamenta*
- *Divi tree*
- *WWII History*
- *Dutch Influence*
- *Multilingual*
- *Shaca (Owl)*



The Aruba DNA

*Stems from its friendly, curious,
resilient people, its paradise
appeal and its spirit of
reinvention*

*(Based on initial assessment - to be
finalized in Aug-Sep 2017)*

*Strengthen and improve
our DNA?*

*Strategies that are in
the DNA (Niche Strategy)*



*Guarding against communication that
contradicts DNA (crowds, over-developed, artificial, pollution)*

*Strategies that compromise
the DNA (party-island, mainstream, loud)*



Engaging local community



3.3 The Aruba Visitor - A new approach

As indicated in the Action Plan, A.T.A. will undertake a niche assessment to determine new niche opportunities and priority areas that can lead to the highest Return on Investment (ROI) on a short to medium term. Any new niches identified will be further developed with input from stakeholders over the next five to ten years. A.T.A. will further define the types of visitors that are seeking the Aruba DNA experience.

The DDP process in combination with the DNA assessment identified the following lifestyle characteristics of the "new" Aruba visitor:



Self-actualizer
The need for self-fulfillment, being inspired, learning, a life of meaning.




Active
Being outside, a healthy lifestyle, self-starter, mindful living.



Curious explorer
Discovering, exploring, experiencing life.



Authentic Experienter
Cares about sustainability, culture and "the local experience"

A woman in a blue shirt is pointing at a chalkboard menu in a cafe. The menu lists items like ACÁI, PITANGA, and YOGURT. The background shows a cafe interior with tables and chairs.

Note: A new visitor approach does not mean that a visitor who doesn't match any of the profiles is not welcome. The Action Plan will be implemented in stages. This will ensure a balance between stability (preserving the core) and growth (stimulating process). Essentially, the new visitor approach will focus on developing a communication strategy that is in alignment with the Aruba DNA and move away from communication that contradicts the "Aruba truth". This will lead to stronger alignment between the visitor experience and visitor expectations, which is a crucial driver of visitor satisfaction and spending. In other words, seeking improved alignment with the Aruba DNA drives on increase in ROI.

CRAFT OF WEAVING?

1. How do you think about the craft of weaving?
2. How do you think about the craft of weaving?
3. How do you think about the craft of weaving?

4



ACTION PLAN DEVELOPMENT

- 4.1 *Why - Objectives*
- 4.2 *How - Process*
- 4.3 *What - DDP*
- 4.4 *Who - Stakeholders*



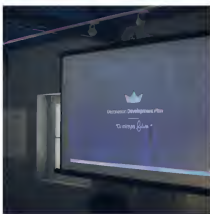
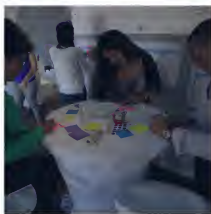
ACTION PLAN DEVELOPMENT

■ Chapter 4

The DDP was developed with stakeholders through a participatory and open process over the course of ten months. The process evolved into an Action Plan (refer to page 76) that is guided by a common vision, with input from stakeholders, including the local community via town halls and student sessions.

THE APPROACH

- *Bottom-up*
- *Active stakeholder participation*
- *Transparent process*



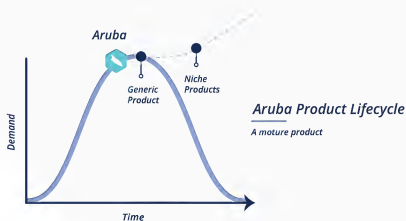


4.1 Why - Objectives

What got us here won't necessarily get us there...

The same tourism model that was used for Aruba in the '90s does not apply to today nor will it apply to the future. It is imperative to re-assess Aruba's tourism direction and strategic priorities as a destination to continue on a smart path toward sustainable growth:

- *Balonce between community and visitor needs*
- *Sofeguord scarce resources and protect o fragile environment*
- *Enhonce quoolity of life of the community*
- *Increase the economic value of tourism*



Why now?

- *Moture product that requires diversification to mointoin its competitive advontoge*
- *Diminishing returns and regressive growth pottrens compel o new way of thinking*
- *Mointoining competitive advontoge is critical to uphold tourism's economic contribution to GDP*
- *Ropidly chonging tourism industry colls for ingenuity and experimentation*
- *New troveler demonds require on exceptional experientiol product*
- *High levels of density leave little to no copocity for expanson over mid to long term*
- *Sensitivity to external factors colls for higher economic resilience*





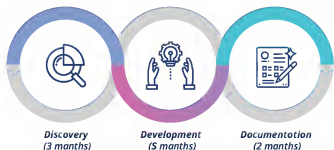
4.2 How - Process

The 3 phases of destination development planning

A phased approach:

- *Discovery: Planning, initial research to establish key questions, challenges and objectives*
- *Development: Design and validation of the plan in collaboration with stakeholders*
- *Document: Drafting the final report, supporting documents and action plan, and discussing the findings with stakeholders*

Timeline



**Refer to the DDP road map on page 70 for the key activities of each phase.*

Discovery Phase

Along with an extensive group of tourism stakeholders who contributed their knowledge and expertise during various sessions in September 2016 through April 2017, the Aruban community provided valuable insights and recommendations that shaped and informed the DDP.



Process Objectives

The following objectives were identified at the outset and served as the guiding principles for development of the Action Plan and the various stakeholder sessions:

- *Strengthen synergy and collaboration amongst stakeholders*
- *Articulate a statement of purpose or common vision that is inspiring, concrete, and measurable (Aruba "to become THE destination in the Caribbean to [fill in the blank]")*
- *Identify priority actions that lead to enhancement of the overall visitor experience and delivery of a brand promise*
- *Identify actions that promote synergy between destination enhancement and community needs*
- *Identify opportunities to increase the economic value of tourism*

Sustainable Tourism Diagnostic

Integration of Sustainable Destinations Alliance for the Americas (SDAA) and the Aruba Sustainable Development Goals Committee (SDG Aruba)

In collaboration with Sustainable Destinations Alliance for the Americas (SDAA), and coordinated by Sustainable Travel International (STI), A.T.A. undertook a sustainable tourism diagnostic during the DDP discovery process. The timing of the diagnostic expediently coincided with the kick-off of the Aruba Sustainable Development Goals Committee (SDG Aruba) at national level. SDG Aruba is an ambitious government-led initiative, supported by the United Nations, to help coordinate and develop private-public and international relationships to achieve the United Nations 2030 Agenda, Sustainable Development Goals (SDGs) on the island of Aruba.

Sustainable Destinations Alliance of the Americas ("SDAA")

Publicly launched by Sustainable Travel International in March 2014, and endorsed by the UNWTO, the Sustainable Destinations Alliance for the Americas ("SDAA") is an innovative public-private partnership with a shared vision to building resilience in local communities, improving the way tourism is managed, and enhancing competitiveness in 30 destinations across the Caribbean and Latin America. Aruba has been an SDAA member since September 2016.

SDG Aruba was integrated into the DDP process to maximize destination resources and to ensure sustainable tourism standards and monitoring systems are developed in alignment with the Sustainable Development Goals that impact or are impacted by tourism. Particularly, goals 8, 12 and 14 on inclusive and sustainable economic growth, sustainable consumption and production and the sustainable use of oceans and marine resources, respectively, and goal 17, partnerships for the goals.



The Action Plan indicates where an action is in alignment with SDAA recommendations on sustainable tourism development or coordinated with SDG Aruba.

Diagnostic

Aruba's current performance was benchmarked against 105 internationally recognized indicators for sustainable destination management covering the following four main themes:

- *Sustainable destination management*
- *Community involvement and benefits*
- *Cultural and natural heritage management*
- *Environmental conservation*

This diagnostic was completed through a wide range of methods, including a desk-based research, documents review, and field visits in October 2016 and January 2017. Field visits included one-on-one meetings with key leaders and organizations involved in tourism, themed focus groups, and site visits to key attractions.

The aim of this assessment was to provide Aruba with a 360-degree profile of its status with respect to sustainable tourism. The diagnostic findings and STI recommendations have been integrated in the Action Plan.

Development Phase

Along with an extensive group of tourism stakeholders who contributed their knowledge and expertise during various sessions over the course of ten months, the Aruban community provided valuable insights and recommendations that helped shape the DDP.

The approach:

- *Bottom-up*
- *Active stakeholder and community participation*
- *Transparent process*

An inclusive process that considered the needs of:



Our Visitors



Our Community



Tourism Sector



Key Stakeholders

A Participatory Process:

10
Months



50+
Sessions



350+
Participants

3
Town Halls



100+

*Crowd-Sourced
Recommendations*



75+
Students

Bottom-up approach



Collaborative Destination Planning

The gathering of stakeholder feedback was accomplished through:

- Interactive community town hall meetings.
- Student sessions.
- Multi-disciplinary committee meetings.
- Incubator brainstorm and creative sessions.
- A plenary session with committees, incubators and sounding board members.
- Individual sessions with management of key destination stakeholders.

360-validation loop

Findings from all sessions were reviewed at committee and sounding board level and validated with incubator participants in an open process. The following "360-validation loop" method was applied:



This approach encouraged development of consensus amongst stakeholders on key destination themes. Including the community and stakeholders at all levels of the process helped hone strategic priorities, identify synergies and deliberate on allocation of responsibilities with respect to recommended actions.

Developing the Strategic Framework

In developing this innovative framework for destination development, local participants were asked some fundamental questions through a series of interactive incubator sessions. These sessions utilized a combination of gamification, design thinking principles, user experience philosophies, and lean prototyping techniques in order to elicit valuable responses.

The discussions were centered around the following key questions:

- Who are we?
- What do we want?
- What we do not want?
- Where are we today?
- How do we make it happen?

The results from the incubator sessions were vetted through a series of committee and sounding board sessions. In addition, the plan also considers visitor feedback gathered through various studies and exit surveys to ensure a balance between community and visitor needs.



Validation Loop Highlights

An intensive open process

Key Takeaways Stakeholder Sessions

Aruba is a great destination but must revisit its strategic direction and communication strategy to maintain its competitive advantage.

Why:

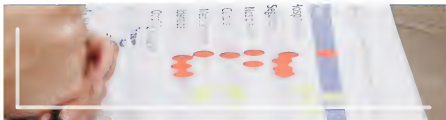
- *Travelers seek authentic immersive experiences*
- *The destination is "stressed"; a carrying capacity review is critical*
- *There is an emergent sentiment that Aruba is losing its sense of place*

The community's vision is a destination that is economically, socially and environmentally sustainable.

How do we accomplish this?

- *Aruba's core base (safety, beach, hospitality) should be safeguarded*
- *The focus should be on quality over quantity*
- *Transparency and master planning is required for destination alignment*
- *An action plan that ensures destination development benefits the community and visitors through seeking balance between stability and growth*

This is the foundation upon which the Action Plan was built and will be revisited on an annual basis with stakeholders.



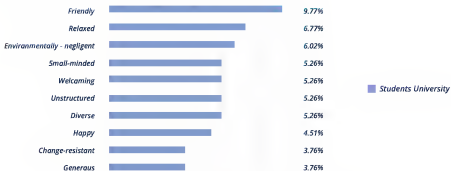


SELF-ASSESSMENT - Destination Sentiment Assessment: Where are we now?



What are students saying?

Destination Personality Survey - Aruba Characteristics



* Source: University of Aruba Students Incubator Session January 2017

Key Areas of Concern - Destination Aruba

LACK OF INNOVATION



BUSINESS CLIMATE



LOSS OF CULTURE



OVER
DEVELOPMENT



SAFETY

* Source: University of Aruba and EPI Hospitality Students Incubator Sessions February 2017



What is the community saying?

Community Priorities Related to Tourism - Town Halls

	HIGH	MEDIUM	LOW
Safety	85%	13%	2%
Hospitality	70%	22%	8%
Environment	66%	34%	-
Identity	52%	25%	23%
Culture	51%	27%	22%
Beaches	51%	38%	11%

* Source: Town Hall Sessions January 2017

Expansion Hotel Product - Town Halls

	YES	NO
Expand hotel product	13%	87%
Luxury / 5 star hotel*	35%	65%
All-inclusive hotel	2%	98%
Boutique hotel*	73%	27%
Condominiums	3%	97%
Time share	8%	92%
More variation in product	91%	9%

* Luxury boutique hotels 10-40 rooms in San Nicolas / other areas

** Source: Town Hall Sessions January 2017

Documentation Phase

The extensive ten-month process described herein resulted in a cohesive action plan for destination Aruba.

Each action is separately documented in the plan, which sets out:

- *Key issue(s)*
- *Action and Game Plan*
- *Impact (desired result)*
- *Responsibilities (who will lead the action and/or whether the action requires advocacy)*
- *Key partners*
- *Timeline or key milestones*
- *Key performance indicators*

Refer to page 76 for the Action Plan





4.3 What - DDP

Strategic Framework for Destination Development

A phased approach:

The process described herein resulted in five *Strategic Objectives* which will be carried out through 22 *Development Priorities* with 90 specified *Actions*. The *Development Priorities* and corresponding *Actions* are co-dependent and will work in tandem to carry destination Aruba toward a common vision.

"Jointly working toward becoming a sensible boutique destination that inspires curiosity"

Preserve the Core - Stimulate Progress

The DDP's guiding philosophy is to preserve Aruba's core while stimulating progress and recommendations to be implemented or advocated in 2017 through 2021.

Preserve the Core

- *Core Assets: Safety -> Beach -> Hospitality*
- *The Aruba DNA*
- *Consistency of principle -> Direction*



Stimulate Progress

- *Renewal / Evolution*
- *Frequent review / Pilots*
- *Flexibility in Process*



4.4 Who - Stakeholders

Over 350 stakeholders actively participated in the DDP process over the course of ten months.

Committees and Incubators

Most participants were convened into committees or incubator groups based on:

- Expertise and background
- Experience level
- Diversity in age and gender
- World view and interests
- Cross-sector balance (government, private sector, NGO's)

Themes

The committee and incubator sessions were divided by clusters that can be linked to a general theme. Sessions were held by cluster and/ or a combination of clusters. This method ensured both focused and comprehensive cross-theme discussions for each session.

Main themes selected that impact or are impacted by destination development:

1. Communication
2. Economic Factors / Economy
3. Human Capital & Sustainability
4. Infrastructure
5. Niche Segments
6. Technology & Innovation

Incubators
Tavern Halls
Students



6 Sounding Boards



30 Committees



100+ Incubator Participants

A Core team = Guided the process



90+ Actions

Guided by a Common Vision

- Communication
- Economic Factors / Economy
- Human Capital & Sustainability
- Infrastructure
- Niche Segments
- Technology & Innovation

Board Members



3 Town Halls



10 Months

Members



75+ Students



350+ Participants

Contributor Participants



100+ Crowd-Sourced Recommendations



50+ Sessions



Active Participation of 350+ Stakeholders

- Academics
- Activists
- Business Owners & Leaders
- Change-Makers
- Creatives
- Disrupters
- Entrepreneurs
- Government
- Industry Experts
- Innovators
- Local Community
- Niche Connoisseurs
- Policy-Makers
- Students





*An engaged stakeholder
with a strong sense of ownership*

CURIOSITY



WILL



FACT-BASED



EXPERTISE



....and a whole lot of passion

holder community
sense of pride...

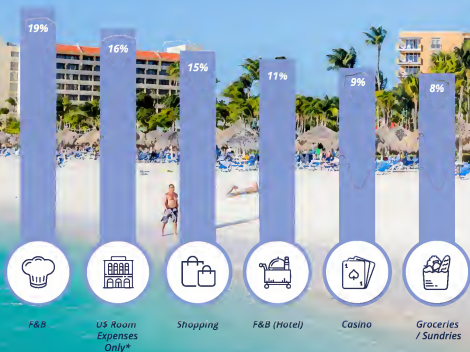


e lot of heart!

Sessions

Visitor Spending Behaviour

The chart below depicts visitor on-island spending behavior based on a 2016 Exit Survey conducted by A.T.A. Note: room is not included. The below charges relate to expenses charged on-island to rooms.



* Includes expenses charged to rooms. Not lodging charges.

** A mere 1% of dollars spent on Local Arts & Culture indicates opportunity for growth.

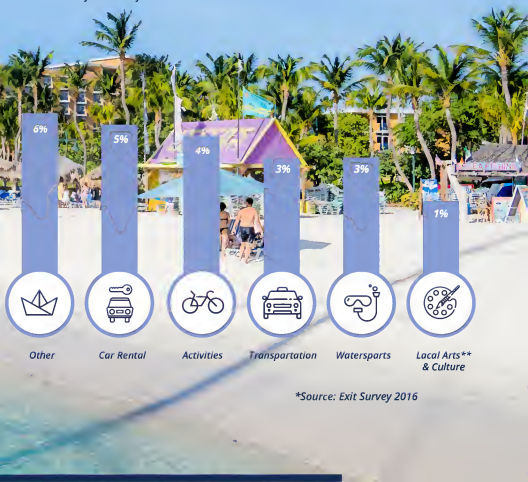
A Multi-Faceted Visitor Experience requires degree development

The Aruba visitor experience is multi-faceted and each facet has a role in optimizing the experience.

Destination development, therefore, should also be multi-faceted to ensure optimization of the visitor experience throughout the entire visitor journey.

Higher visitor satisfaction levels drive:

- Spending
- Repeat visitors
- Word of mouth referrals



*Source: Exit Survey 2016



The Current Visitor

Aruba remains one of the top preferred destinations in the Caribbean with high levels of guest satisfaction and repeat visitors compared to its competitors. To maintain and improve this competitive advantage in a rapidly growing competitive landscape, the DDP Action Plan is centered around enhancement of the Aruba product, through an increase in quality of the 360-degree visitor experience.

In developing the Action Plan, we considered visitor feedback surveys, satisfaction studies and focus group research for key markets. Based on the 2016 visitor surveys and satisfaction studies, Aruba maintains an above average satisfaction rating with visitors and potential visitors.

Identified key areas of improvement and attention are generally consistent across various visitor groups and are included in the Action Plan.

A noteworthy observation is that feedback received from stakeholders, including community and students, largely mirrors the visitors' needs. This ensures a balance between community and visitor needs.



Visitor Feedback



*Source: IPSOS Report 2016 / TCI Research 2016

Visitor Insights

Today's traveler wants to discover untouched hidden gems and unique, lesser known places within a destination. In addition, today's traveler is constantly seeking one-of-a-kind, authentic experiences.

Communicating Aruba's ideal sense of place and delivering uncommon experiences will be key to providing the visitor with a direct connection to the history of the island, the soul of its people, and the Aruban way of life.



BEACH AND WEATHER



GOING OUT TO DINNER



GREATER DESIRE FOR LOCAL AUTHENTIC EXPERIENCES

CULTURAL ACTIVITIES AND FAIRS

LANDMARKS, SIGHTSEEING OPTIONS

SEEING NATURAL FEATURES



VALUE FOR MONEY

SAFE ENVIRONMENT FOR EXPLORATION

*Sources: - IPSOS 2016, Airport Exit Survey 2016, U.S. Focus Groups 2016, TCI Visitor Spending Survey 2016
- TCI Global Competitiveness Benchmark 2013.





Destination Development SWOT

The destination development SWOT is a balanced assessment of the key concerns and facets (what do we need to "be", "do", and "have") identified during the DDP process and visitor feedback.

Strengths:

- Mature product
- Healthy demand
- Big brand/chain hotels
- Creative and curious stakeholders
- Core assets (safety, beach, hospitality)
- Brand equity
- Diversity



Opportunities:

- Diversification and development of unique experiences
- Niche development in alignment with DNA
- Innovation and entrepreneurship
- Community engagement
- Development of sustainability mindset
- Thought-leader positioning for UN 2030 Agenda, Sustainable Development Goals
- Storytelling
- Positioning as creative, design oriented boutique destination

Weaknesses:

- Urban planning / stressed capacity
- Mature product / lack of diversification ("too Americanized")
- Business climate
- Over-commercialization
- Lack of innovation
- Lack of community engagement
- Lack of authentic immersive experiences

Threats:

- Exceeding carrying capacity
- External factors such as Global and US Economy
- Climate change
- Increasing competition in the region
- Safety concerns
- Lack of policy awareness, enforcement, and accountability
- Quality of beach experience under pressure
- Declining youth-tourism connection

Stakeholders Self-Assessment

Areas of concern across themes

- Safety
- Environment / Natural Resources Protection
- Education / Awareness
- Carrying Capacity
- Urban Planning
- Quality / Value of Tourism Product
- Innovation
- Business Climate



What does the destination need to BE, DO, HAVE?

- Invest in Education + Innovation + Entrepreneurship
- Infrastructure Master Planning at National Level
- Protect Main Assets (Beach, Hospitality, Safety)
- Sustainable Mindset + Enforcement of Policies
- Collaboration on Policy + Accountability
- Cultural Curiosity + Creative Confidence
- Transparency + Social Dialogue





Our Commitment

Over the course of ten months we interacted with a wide spectrum of stakeholders, including hundreds of members of the local community.

Through this intensive and transparent bottom-up approach, we obtained a comprehensive perspective of where Aruba's tourism industry stands today, and where the island wants to go in the future.

Guided by our common vision to becoming a sensible boutique destination, 5 key Strategic Objectives were identified along with, 22 Development Priorities, and 90+ Actions.

1

***Balanced
Development***

2

***Increase
the Economic
Value of
Tourism***

3

***Amplify
Sense of
Place***

4

***Develop
an Innovation
Mindset***

5

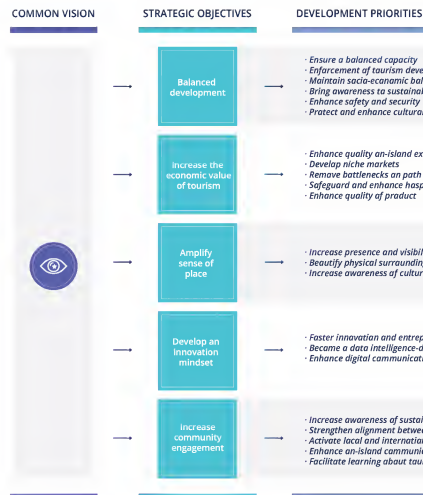
***Increase
Community
Engagement***

The Action Plan represents:

- *An implementation strategy balanced between Stability ('Preserve the Care') and Growth ('Stimulate Progress')*
- *A system for putting our aspirations into action*
- *A compass stakeholders can use to examine their internal strategies and guide future decisions to ensure that both align with the direction of destination Aruba*

With our objectives, priorities and actions defined, we are shifting now into an implementation phase to make these things a reality and transition Aruba into the quintessential 21st century boutique destination that inspires curiosity.

*“Our **curiosity** anchors the DDP;
our commitment propels it
into **action**”*



The Action Plan will be implemented in three phases. The first phase will focus on establishing the infrastructure and initiatives to be rolled out in the second and third phases.

- Phase I - Actions kicking off in 2017 and 2018: Foundation and Guideline Development
- Phase II - Actions kicking off in 2019 and 2020: Project Roll-Outs and Policy Implementation
- Phase III - Actions kicking off in 2020 and 2021: Project Roll-Outs and Policy Implementation



structure for destination development going forward, with the majority of the development projects and

ROADMAP

| 01



DISCOVERY
PHASE

| 02



STRATEGIC
PLANNING

| 03



IMPLEMENTATION
& MONITORING



AUG

PROJECT PLAN

- Timeline
- Collaterals List
- Communication Strategy
- Integration of Ongoing / Related Projects

DATA & INSIGHT GATHERING

CORE TEAM
DISCUSSIONS

CONFIRM
ASSUMPTIONS

DESK REVIEW

- Existing Tourism Plans + Data
- National Plans (Incl. Nos Aruba 2025)
- High Level International Destination Plans Benchmark
- Trends Research

VETTING OF FINDINGS

- Digitization and Organization
- Holistic Review of Findings and Incubator Results

SELF- ASSESSMENT

- Scaling (ranking of key destination development themes)
- Identification of Key Concerns, Bottlenecks, and Development Priorities
- Sentiment Assessment
- Visioning
- DNA

SDAA/STI ASSESSMENT

- Sustainable Tourism Diagnostic
- Review of 105 indicators
- Site Visits
- Stakeholder Sessions
- Alignment SDG team

DISCOVERY PHASE



ROADMAP

01



ASSESSMENT & RESEARCH

02



DEVELOPMENT
PHASE

03



IMPLEMENTATION & MONITORING



CONVERTING OF STAKEHOLDER RECOMMENDATIONS INTO STRATEGIC FRAMEWORK

- Establish Key Concerns + Development Priorities
- Define Actions
- Summarize "BE,DO,HAVE"

PREPARE BRIEFING FOR STAKEHOLDERS

- Findings
- Self - Assessment Results
- DNA Results
- Vision



VALIDATION SDAA/STI RESULTS

- Review Sustainable Tourism Diagnostic Results
- Policy Gaps
- Identify Quick-Win Projects with Stakeholders

BRIEFING FOR DNA ASSESSMENT

- Internal Research
- Gather Relevant Insights
- Aruba History Review



COMPARATIVE ANALYSIS

- Review all input:
 1. Incubators
 2. Town Halls
 3. Students
- Revisit Visitor Feedback/Insights

STUDENT SESSIONS

- DNA
- Validation of Actions

INDEPENDENT DNA ASSESSMENT

- Third Party Review
- Develop DNA Statement
- Advice on Communication Direction Going Forward
- Foundation for Brand/Communication Strategy + Niche Development



ACTION PLAN DEVELOPMENT

- Formulate Recommendations + Insights into Concrete Actions
- Identify KPIs
- Set Timeline
- Identify Key Partners + Lead
- Define Desired Outcomes (Impact)

VALIDATE DDP FRAMEWORK + ACTION PLAN

- Plenary Session with Sounding Board, Committees, Incubators, and SDAA Participants.
- Discuss DNA Statement
- Validate Common Vision

DEVELOPMENT PHASE





ROADMAP

101



Identify Key Partners

102



Develop a Draft DDP Report

103



DOCUMENTATION PHASE



MAY

DRAFTING ACTION PLAN

- Revisit Timeline and Key Partners
- Segment by A.T.A. Lead Actions, Partner Actions, or Advocacy Agenda

DRAFT DDP REPORT

- Gather Latest Dates
- Review with Team

BOARD

May - June 2017

DOCUMENTATION PHASE







ACTION PLAN

Cu mira pa *futuro*



NOTES



SDAA ICON

Action stems from and/or is in alignment with SDAA recommendations on sustainable tourism development based on a diagnostic and regional benchmark led by Sustainable Travel International.



SDG ICON

Action to be coordinated with the Aruba SDG committee to maximize destination resources and to ensure sustainable tourism standards and monitoring systems are developed in alignment with United Nations 2030 Agenda, Sustainable Development Goals.

A.T.A. Roles

Lead:

A.T.A will spearhead the implementation and monitoring of the lead actions and will incorporate these actions into its Strategic Business Plan.

Partner:

Actions that are not within A.T.A.'s scope but impact the destination and its tourism sector will be led by the respective stakeholder(s). A.T.A. will be a partner (collaborator) in the implementation of those actions.

Advocate:

Matters that impact the broader community and/or are not (directly) within A.T.A.'s scope are indicated as advocacy actions; A.T.A. will seek to play an advocacy role with the respective stakeholders to induce greater alignment between the visitor experience and socio-economic development.

Measurement and Monitoring

Measurement and monitoring of actions will take place on a continuous basis. Key Performance Indicators (KPIs) will be set on an annual basis and synced with A.T.A.'s annual corporate plan. Where relevant, KPIs will be discussed and agreed with stakeholders to ensure partner alignment.

The Watchdog Platform (once established) is expected to function as a second layer for monitoring of the DDP Action Plan and DDP advocacy agenda.



ABBREVIATIONS AND ACRONYMS

AAA	<i>Aruba Airport Authority</i>
ABA	<i>Aruba Banking Association</i>
ABC	<i>Aruba Birdlife Conservation</i>
ACP	<i>Aruba Certification Program</i>
ADP	<i>Arte Di Palabra (Papiamenta literary initiative)</i>
AGA	<i>Aruba Gastronomic Association</i>
AHATA	<i>Aruba Hotel and Tourism Association</i>
AHSF	<i>Aruba Hospitality & Security Foundation</i>
AIB	<i>Aruba Investment Bank</i>
ALRA	<i>Aruba Luxury Retailers Association</i>
ANA	<i>Archiva Nacional Aruba (National archives)</i>
APA	<i>Aruba Parts Authority</i>
ARA	<i>Animal Rights Aruba</i>
Architects	<i>Licensed Local architects</i>
Arikok	<i>Arikok National Park Foundation</i>
Arina	<i>Aruba Investment Agency</i>
Aruba Doet	<i>Aruba Doet Foundation</i>
ATECH	<i>ATECH Foundation</i>
ATIA	<i>Aruba Trade & Industry Association</i>
ATOA	<i>Association Taur Operators of Aruba</i>
ATSA	<i>Aruba Timeshare Association</i>
AVBA	<i>Arubaanse Vereniging van Belastingadviseurs (Tax consultants association)</i>
BI	<i>Bureau of Innovation</i>
BNA	<i>Biblioteca Nacional Aruba (public library)</i>
CAAS	<i>Content As A Service</i>
CBA	<i>Central Bank of Aruba</i>
CBS	<i>Central Bureau of Statistics</i>
CDB	<i>Centra di Baria</i>
Cede	<i>Centra pa Desaraya di Aruba (NGO)</i>
Censo	<i>Census Bureau</i>
CI	<i>City Inspector</i>
Communication partners	<i>Local communication (phone / internet) providers</i>
Cosecha	<i>Aruba craft and design store</i>
CRA	<i>Car Rental Association</i>
Creatives	<i>Local creative industry professionals and entrepreneurs</i>

Curriculum Ontwikkeling	<i>Educotion curriculum development unit</i>
DCA	<i>Departemento di Cultura Arubo (Department of culture)</i>
Department of Education	<i>Educotion department of the Government of Arubo</i>
Department of Labor	<i>Labor department of the Government of Arubo</i>
DEZHI	<i>Directie Economische Zaken, Handel en Industrie (Department of economic affairs)</i>
Digital designers	<i>Local graphic and interactive design professionals and entrepreneurs</i>
DIMP	<i>Departemento di Impuesto (Tax department)</i>
DIP	<i>Directie Infrastructuur en Planning (department of infrastructure and planning)</i>
District leaders	<i>Local community leaders of specific districts</i>
DLVV	<i>Directie Landbouw, Veeteelt en Visserij en Morkthollen (Department of agriculture and fishery)</i>
DNM	<i>Directie Natuur en Milieu</i>
Douane	<i>Customs department</i>
DOW	<i>Dienst Openbare Werken (department of public works)</i>
DTI	<i>Dienst Technische Inspectie (department of technical inspection)</i>
DWJZ	<i>Directie Wetgeving en Juridische Zaken (legislative department)</i>
Entrepreneurs	<i>Local entrepreneurs and aspiring entrepreneurs</i>
Entrepreneurs organizations	<i>Local organizations and foundations established to stimulate entrepreneurship</i>
EPE	<i>Enseñonso Po Empleo (Professional training organization)</i>
EPI Hospitality	<i>Educacion Profesional Intermedio (Public high school for professional studies - hospitality sector)</i>
Event planners	<i>Local event planning companies, professionals and entrepreneurs</i>
Experience providers	<i>Local tour operators, businesses, and entrepreneurs who offer unique visitor experiences</i>
F&B sector	<i>The local food and beverage sector</i>
FMA	<i>Fundacion Museo Arubano (museum foundation)</i>
FP	<i>Fundacion Papiamento (Papiamento foundation)</i>
GOA	<i>Government of Arubo</i>
Historians	<i>Experts in or students of Aruban history</i>
Hospitals and private clinics	<i>Local hospitals, public medical clinics and private medical clinics offering visitor services</i>
IDEA	<i>Iniativo pa Desaroyo di Empreso Arubano (Initiative for local business development)</i>



ABBREVIATIONS AND ACRONYMS

Incubator
Infrastructure Team
Interior designers
KPA
KPI
KVK

Local chefs
Local community
Marine Park
Marketing and creative agencies
MBA
MFA

Ministry of Justice

Ministry of Tourism

NGOs
OBID
OM
Payment institutions

Private sector

Credits
Retail sector

ROP
ROPV

RVK
San Nicolas associations

Santa Rosa
SDG
Slachtofferhulp
SMEs

Entrepreneurship incubator (octison #62)
Special infrastructure unit of Government of Aruba
Local interior design professionals and entrepreneurs
Korps Politie Aruba (police department)
Key Performance Indicator
Komer van Koophandel en Nijverheid Aruba
(Chamber of commerce)
Local professional chefs and chefs in training
Citizens and residents of Aruba
Marine Park Aruba (Arikok National Park)
Local businesses offering marketing and creative services
Monument Bureau Aruba
Multifunctionele Accommodatie
(Multi-functional government service desk)
Ministry of Justice department of the Government of Aruba
Ministry of Tourism department of the Government of Aruba
Non-Governmental Organizations
Oranjestad Business Improvement District
Openbaar Ministerie (public prosecutor's office)
Banks, finance institutions, and startups offering payment solutions
Local for-profit businesses and organizations that are not under direct government control
Private Micro-Finance Institution
Local businesses that sell goods through stores or on the internet to the public / visitors
Ruimtelijk Ontwikkelingsplan (zoning plan)
Ruimtelijk Ontwikkelingsplan met Voorschriften
(Zoning regulations)
Raad van Kinderen (The Kid's Council Institution)
San Nicolas Business Improvement and Community Associations
Department of Agriculture, Farming, Livestock and Fishery
Aruba Sustainable Development Goals committee
Victim Support Unit
Small and Medium Enterprises

SMFA

Strategic Innovation Fund Team

Summer camps

Taxi associations

TCH

TNO

UOA

Volksgesondheid

Watchdog

Wedding planners

WiFi providers

Stichting Monumentenfonds Aruba (monument funds foundation)

Team (tbd) assigned to manage the planned Strategic Innovation Fund (action #53)

Organizations that provide summer camp or vocation programs to local youth

Local associations of taxi and private bus drivers

Traveling Coribbeon Heritage Project

TNO Aruba (independent research organisation)

University of Aruba

Department of health

Watchdog Platform (action #2)

Local wedding planning professionals and entrepreneurs

Local internet and WiFi providers



COMMON VISION



STRATEGIC OBJECTIVES

Balanced development

Increase the economic value of tourism

Amplify sense of place

Develop an innovation mindset

Increase community engagement

DEVELOPMENT PRIORITIES

- Ensure a balanced capacity
- Enforcement of tourism development
- Maintain socio-economic balance
- Bring awareness to sustainability
- Enhance safety and security
- Protect and enhance cultural heritage

- Enhance quality on-island experience
- Develop niche markets
- Remove bottlenecks on path to tourism
- Safeguard and enhance hospitality
- Enhance quality of product

- Increase presence and visibility
- Beautify physical surroundings
- Increase awareness of culture

- Faster innovation and entrepreneurship
- Become a data intelligence-driven organization
- Enhance digital communication

- Increase awareness of sustainable tourism
- Strengthen alignment between stakeholders
- Activate local and international networks
- Enhance on-island communication
- Facilitate learning about tourism







THE ACTION PLAN

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Actions kicking off in 2017 and 2018

PHASE 1

STRATEGIC OBJECTIVE	DEVELOPMENT PRIORITY	#	ACTION*	KEY ISSUES	ACTION GAME
Balanced Development					
	Ensure a balanced capacity	1	Carrying Capacity Review	Overcapacity, zoning, crowded, sense of place, visitor experience, quality	Carrying capacity review the current and future capacity socio-economic and environmental impact. Develop accommodations in alignment with capacity and niche road map
	Enforcement of tourism development plans and standards	2	Watchdog Platform	Awareness, enforcement of DDP actions	Creation of an independent platform: body for monitoring implementation and awareness of DDP action plan, incl. SDAAs and DDP advocacy agenda
	Enforcement of tourism development plans and standards	3	Advocacy Agenda	Alignment, fragmentation	Develop and implement an advocacy agenda and awareness platform actions that are integral to destination development
	Maintain socio-economic balance	4	Sustainable Tourism Do's and Don'ts	Misrepresentation, conservation	Develop simple do's and don'ts for stakeholders to encourage responsible tourism promotion. Focus on conservation, as well as responsible photography that may encourage sustainable practices
	Maintain socio-economic balance	5	Code of Conduct	Awareness, enforcement	Develop code of conduct for visitors to provide information on the policies for visiting and exploring attractions and wildlife and what is important to us
	Maintain socio-economic balance	6	Safety and Security Standards	Awareness, enforcement, safety, environmental footprint	Aruba Tourism Quality Seal safety and security standards for outdoor adventures and exports (beach, land and sea)
	Maintain socio-economic balance	7	Urban Planning Council	Crowded, zoning and enforcement, sense of place	Establish urban planning commission to monitor infrastructural development and adherence to ROP / zoning to share best practices (do's and don'ts) through an open-forum and platform

* *Actions listed are clustered by Strategic Objective and Development Priority. The action numbers do not follow a timeline sequence.*

** *Refer to page 80 for a list of acronyms and abbreviations used in the plan.*

*** *Refer to pages 116-131 for a visual timeline of the action plan.*

PLAN	IMPACT	LEAD	A.T.A. ROLE	STRATEGIC PARTNERS**	*** TIMING
Plan that considers sustainability and its environmental degradation policy recommendations	Sustainable destination management, balanced growth, quality visitor experience	A.T.A.	Lead	SDG, CBA, CBS, UOA, NGOs, GOA, local community	Q3 2017 - Q1 2018
Plan that watchdogging, ensuring effectiveness of the actions and	Cohesive destination management, transparency, championing of enforcement of (existing) policies	A.T.A.	Lead	SDG, GOA, CBS, NGOs, UOA, KPA, DOW, DIP, local community, private sector	Q3 2017 - Q1 2019
Plan that annual advocacy plan for DDP sustainable	Cohesive destination management, increased collaboration	A.T.A.	Lead	Contingent upon advocacy agenda	Q3 2017 - Q4 2021 (set annually in Q3)
Plan that don't's guide manage sustainable on accuracy, restricting the use encourage unsus-	Increased awareness of stakeholders and visitors, increased protection of cultural and natural assets	A.T.A.	Lead	AHATA, ATSA, DNM, KPA, NGOs, DCA, MFA, ATOA, CRA, DTI	Q3 - Q4 2017
Plan that for visitors to rules and experiencing why it is	Increased awareness of visitor, limited visitor footprint	A.T.A.	Lead	Arikok, Marine Park, SMEs, NGOs, DNM	Q3 - Q4 2017
Plan that i: Develop rds far extreme a, Arikok)	Strengthens visitor liability management, enhanced product quality, access to relevant (digital) data	A.T.A.	Lead	KPA, DNM, Arikok, DIP, hospitals and private clinics, experience providers	Q3 - Q4 2017)
Plan that Council to velopment ning. Council s and don't's) d digital	Balanced capacity, enhanced quality of life	DIP	Advocacy	DCA, GOA, DIP, KVK, DEZHI, FMA, APA, AAA, DIP, DOW, Infrastructure Team, Watchdog, local community, architects, interior designers, private sector	Q1 - Q4 2018



Actions kicking off in 2017 and 2018

PHASE 1

STRATEGIC OBJECTIVE	DEVELOPMENT PRIORITY	#	ACTION*	KEY ISSUES	ACTION GAME
	Bring awareness to sustainable tourism	8	Sustainable Tourism Curriculum	Awareness, sustainability mindset	Introduce sustainable tourism curriculum (incl. environmental conservation and culture) in primary and secondary education
	Enhance safety and security	9	Safety Awareness Campaign	Destination image, brand promise, quality of life	Create (safety) awareness for visitors and local community
	Enhance safety and security	10	Curb on Solicitation	Quality of experience, unlicensed solicitation, nuisance	Implement action plan to curb illegal solicitation by vendors on the beach, in hotels and/or by ambulant addicts in public areas
	Enhance safety and security	11	Tourism Policing	Safety, monitoring	Reinforce safety and security mechanisms (incl. lighting, cameras) in key areas and staff training
	Enhance safety and security	12	Incident Reporting Platform	Safety, data gathering	Create digital / mobile platform (in various languages) and guidelines for reporting small crimes, incidents and minor accidents directly to police
	Protect and enhance cultural and natural assets	13	Wildlife Protection	Awareness, enforcement, measurement	Reinforce wildlife protection (incl. bird habitats) that is integrated into national and governmental policies. Development of a digital open access database with inventories of marine and indigenous species
	Protect and enhance cultural and natural assets	14	Beach and Ocean Policy	Awareness, enforcement, measurement	360 review of beach, ocean and coastal legislation and enforcement policies. Develop and tighten the requirements for commercial activity, and enforce commercial activity
	Protect and enhance cultural and natural assets	15	Marine Park	Protection, enforcement	Introduce a Marine Park for the protection of the marine ecosystem

* Actions listed are clustered by Strategic Objective and Development Priority. The action numbers do not follow a timeline sequence.

** Refer to page 80 for a list of acronyms and abbreviations used in the plan.

*** Refer to pages 116-131 for a visual timeline of the action plan.

PLAN	IMPACT	LEAD	A.T.A. ROLE	STRATEGIC PARTNERS**	*** TIMING
ism ental n primary	Increased awareness, fosters a sustainability mindset	Department of Education	Partner	SDG, UOA, SMEs, NGOs, Arikok, Marine Park, GOAs	Q3 2017- Q3 2020
ampaign for ty	Alignment, increased awareness, safeguards core asset	A.T.A.	Lead	KPA, AHSF	Q1 - Q4 2018
onitor and ncensed otel areas s in downtown	Reduces safety concerns, limits illegal dealings, enhanced experience	GOA / AHSF	Partner	AHATA, CI, KPA	Q1 - Q4 2018
ty and continuous	Enhanced monitoring, reduces safety concerns	GOA	Partner	HATA, KPA, AHSF	Q1 - Q4 2018
orm (in delines for idents or police	Real time data, proactive tracking of activity (heat map) and trends, facilitates preventive measures, digital reporting	KPA	Advocacy	GOA, OM, Slachtofferhulp, AHSF	Q1 2018 - Q4 2019
n policy (incl. ated at level, incl. open-source of habitats	Enhanced protection of wildlife, conservation of biodiversity, increased awareness and integration	Arikok	Advocacy	SDG, ABC, DNM, Marine Park	Q4 2017 - Q2 2019
, maritime	Enhanced protection of natural assets, stimulates policy enforcement	DIP / DNM	Advocacy	GOA, SDG, Marine Park, DNM	Q1 2018 - Q2 2019
r protection	Protection of coral and marine biodiversity, supports knowledge economy, increased awareness and product development	Arikok	Advocacy	TNO, DNM, UOA, Marine Park, Arikok	Q1 2018 - Q4 2020



Actions kicking off in 2017 and 2018

PHASE 1

STRATEGIC OBJECTIVE	DEVELOPMENT PRIORITY	#	ACTION*	KEY ISSUES	ACTION GAME
	Protect and enhance cultural and natural assets	16	Visitor Impact Monitoring	Awareness, enforcement, measurement	Develop a destination monitoring system
Increase the economic value of tourism					
 	Enhance quality on-island experience	17	Aruba Seal	Service quality, product consistency, static tourism industry	Aruba Quality Seal: Design and implement sustainable tourism standards and service protocols for tourism sector providers
	Enhance quality on-island experience	18	Tech Enhanced Experiences	Evolving product, new traveler demands, automation, speed of adaptation	Enhance authentic experience through technology: Innovation and transformation workshops, augmented / virtual reality, intelligence, blockchain, IoT (things) for tourism private and public
	Develop niche markets	19	Communication Strategy and Niche Road Map	DNA perception, cliché, authenticity, regional competitiveness	Revisit communication strategy (niche markets) for destination / brand alignment and development of potential niche markets. A (long-term) approach towards amplifying certain DNA elements
	Remove bottlenecks on path to purchase	20	Digital Payment Infrastructure	Visitor spending, innovation bottleneck	Fast-track digital payment infrastructure (legal, regulatory awareness)
	Remove bottlenecks on path to purchase	21	Digital Payment Activation	Innovation bottleneck, visitor experience	Promote adoption of digital booking methods through incentives and best practice sharing, implementation and support

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PLAN	IMPACT	LEAD	A.T.A. ROLE	STRATEGIC PARTNERS**	*** TIMING
Monitoring	Limited visitor and community footprint on environment, increased community awareness	A.T.A.	Lead	SDG, DNM, Arikok, Marine Park, CBS, NGOs, Department of Education, ACP, Ministry of Tourism	Q3 2018 - Q4 2019
and risk program for	Increased competitiveness, enhanced product and service quality, sustainable tourism development	A.T.A.	Lead	AHATA, ATSA, DNM, Arikok, Marine Park, KPA, KVK, ATIA, NGOs, Volksgezondheid, AGA, SDG, private sector	Q2 - Q4 2017 (ongoing)
ences with digital (e.g., artificial internet of sector	Immersive experiences, enhanced product value, increased efficiency, lower cost of doing business	Entrepreneurs / private sector	Partner	KVK, ATIA, DCA, DNM, Arikok, FMA, SMFA, MBA, ATOA, BI, entrepreneurs organizations, private sector	Q1 - Q4 2018
ategy (all brand nt of gradual rds ments)	DNA - brand alignment and cohesive communication, greater alignment with visitor expectation	A.T.A.	Lead	NGO's, private sector, experience providers	Q3 2017 - Q1 2018
atory and	Enhanced visitor experience, increased visitor spending, facilitates innovation and entrepreneurship	CBA	Partner	ATIA, CBA, GOA, DWJZ, ABA, DIMP, IDEA, entrepreneurs organizations	Q3 2017 - Q2 2018
il payment/ awareness Roll-out ort	Enhanced visitor experience, maintained leadership position in innovation	KVK / ATIA / payment institutions	Advocacy	KVK, CBA, DIMP, ABA, IDEA, entrepreneurs organizations	Q2 - Q4 2018



Actions kicking off in 2017 and 2018

PHASE 1

STRATEGIC OBJECTIVE	DEVELOPMENT PRIORITY	#	ACTION*	KEY ISSUES	ACTION GAME
	Remove bottlenecks on path to purchase	22	On-Demand Economy	Innovation bottleneck, visitor experience	Host On-Demand Economy for stakeholders, entrepreneurs, startups and SMEs (focused on technologies and platforms)
	Safeguard and enhance hospitality	23	Relaunch Mi Compromiso	Product knowledge, consistency, quality	Relaunch Aruba Certification Mi Compromiso
	Safeguard and enhance hospitality	24	Language Classes	Hospitality, service quality, economic refuge, product value	Set up in-house training program, sponsor ongoing external programs for basic languages, cultural exchange and integration courses.
	Safeguard and enhance hospitality	25	ACP Expansion	Hospitality, service quality, product value & information, storytelling	Expand ACP program scope to include additional modules (e.g., sustainable tourism, code of conduct, social development) to be completed as a foundation module
	Safeguard and enhance hospitality	26	Quality Labor Force	Skills gap, aging labor force, brain drain, demand and supply	Revisit labor laws to create incentives that stimulate quality hiring and productivity
	Safeguard and enhance hospitality	27	Stricter License Requirement	Hospitality, service quality, product value	Make ACP mandatory when applying for or obtaining permits and/or licenses (e.g., taxis, restaurants, tour guides, or green cards for hotels)
	Safeguard and enhance hospitality	28	Hospitality Training - Island Wide	Hospitality, service quality	Introduce complimentary hospitality training available to all residents, activate via local business associations, community leaders, combine with a web platform and downloadable workshop toolkits
	Enhance quality of product	29	Cultural Heritage Capital	Sense of place, density, vibrancy of place, authenticity	Continue the development and branding of San Nicolas and related niches

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PLAN	IMPACT	LEAD	A.T.A. ROLE	STRATEGIC PARTNERS**	*** TIMING
workshop neurs, and an latest (s)	Encourages seamless / on-demand experience, in- creased visitor spending and satisfaction	KVK	Partner	ATIA, AIB, Qredits, ABA, IDEA, ATECH, BI, DEZHI, entre- preneurs organiza- tions	Q2 2018 - Q4 2019
on Program -	Increased competitiveness, enhanced service quality, consistent knowledge-sharing and communication	A.T.A.	Lead	AHATA, ATSA, AGA	Q2 2017
ograms or ograms in expectations	Improved service quality, higher customer satisfaction, skill development	AHATA	Advocacy	ATIA, KVK, AGA, ATSA, EPE, private sector	Q3 2017 - Q4 2018
e with ustainable skill ted after	Improved service quality, empathic experience, higher customer satisfaction, skill development	A.T.A. / ACP	Lead	AHATA, ATSA, AGA, DNN, FMA, BNA, KVK, ATIA, NGOs, DCA, private sector	Q4 2017 - Q4 2018
flexibility, d	Increased quality of labor force, enhanced performance and productivity	GOA	Advocacy	AHATA, ATIA, DE- ZHI, Department of Labor	Q1 - Q4 2018
n renewing r business ants, tour ygiene)	Improved service quality, higher customer satisfaction, skill development	GOA	Advocacy	AHATA, ATSA, pri- vate sector	Q1 - Q4 2018
ospitality idents and es and med with a dable DIY	Improved service quality, higher customer satisfaction, maintained competitive advantage, social cohesion	A.T.A. / ACP	Lead	GOA, ATIA, SDG, AHATA, ATSA, KVK	Q2 2018 - Q4 2019
and d promote	Culture preservation, economic development, enhanced experience	GOA	Partner	AGA, ALRA, AHA- TA, ATSA, ATOA, San Nicolas associations, retail sector, experience pro- viders	Q3 2017 - Q4 2018



Actions kicking off in 2017 and 2018

PHASE 1

STRATEGIC OBJECTIVE	DEVELOPMENT PRIORITY	#	ACTION*	KEY ISSUES	ACTION GAME
	Enhance quality of product	30	Free WIFI	Innovation, new traveler needs, data vacuum, on-island communication with visitor	Offer free Wi-Fi at key points / Island-wide
	Enhance quality of product	31	Product Diagnostic	Brand alignment	Undertake gap analysis of experience programming for with the Aruba brand and map
	Enhance quality of product	32	Placemaking Strategy	Sense of place, connection of people and place, vibrancy of place, authenticity	Develop urban design plan destination that considers environment as a vehicle for sense of place and fostering community and innovation
	Enhance quality of product	33	Accessibility Policy	Facilities for special needs, enforcement	Create an Accessible Island and print)

Amplify sense of place

	Increase presence and visibility of DNA in destination	34	Experiential Lab - Toolkits	Visitor expectation, sense of place, authenticity	Introduce Experiential Lab Downloadables (toolkits) for practice sharing on enhanced product and programming infrastructure, menus, signage, website, newsletter, social
	Increase presence and visibility of DNA in destination	35	Visibility and Integration Aruba Brand	Visitor expectation, sense of place, authenticity	Develop Aruba brand and guidelines to raise awareness local business community and stakeholders
	Increase presence and visibility of DNA in destination	36	Experiential Lab - Papiamentu	DNA perception, sense of place, Americanization	Host Experiential Lab event increasing the visibility of Papiamentu in tourism product and pro

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PLAN	IMPACT	LEAD	A.T.A. ROLE	STRATEGIC PARTNERS**	*** TIMING
Points of interest	Enhanced data collection (heat mapping), visitor footprint measurement, facilitates digital payments and sharing (word of mouth)	GOA	Partner / Advocacy	APA, AHATA, ATSA, WIFI providers	Q4 2017- Q4 2018
Product and brand alignment on niche road	Product - brand alignment, greater alignment with visitor expectation, enhanced sense of place, increased competitiveness	A.T.A.	Lead	AHATA, ATSA, AGA, OBID, ALRA, San Nicolas associations, retail sector, experience providers	Q1 - Q4 2018
Assets for the built environment or creating a new experience	Optimized assets, amplifies the soul of the place, fosters economic development, boutique destination within the destination	A.T.A.	Lead	ATECH, AGA, OBID, CBA, APA, KVK, GOA, BI, DIMP, UOA, DIP, DOW, Infrastructure Team, local community	Q1 - Q4 2018
Digital Guide (digital)	Enhanced on-island accessibility, enhanced visitor experience, increased awareness	A.T.A.	Advocacy	GOA, DIP, DOW	Q1 - Q2 2018
Content for best practices including DNA in (e.g., signage, social media etc.)	Cohesive communication, visibility DNA in product and programming, increased authenticity	A.T.A.	Lead	AHATA, ATSA, AGA, ATIA, KVK, experience providers, marketing and creative agencies, entrepreneurs, creatives, digital designers, retail sector	Q4 2017 - Q1 2018
Brand messaging consistency with the brand	DNA - Aruba brand alignment, greater alignment with visitor expectation, consistency in brand expression	A.T.A.	Lead	AHATA, ATSA, AGA, KVK, ATIA, experience providers, marketing and creative agencies	Q1 - Q4 2018
Content focused on digital marketing programming	Increased competitiveness, enhanced visitor experience, sustainable tourism development, increased authenticity	A.T.A.	Lead	FP, ADP, ACP	Q3 - Q4 2018



Actions kicking off in 2017 and 2018

PHASE 1

STRATEGIC OBJECTIVE	DEVELOPMENT PRIORITY	#	ACTION*	KEY ISSUES	ACTION GAME
Develop an innovation mindset	Beautify physical surroundings	37	Infrastructure Authenticity Guidelines	Brand perception, authenticity	Advocate alignment with A through strengthening regulatory framework (ROP / ROPV)
	Foster innovation and entrepreneurship	38	Business License Reform	Business climate, cost of doing business	Reform business license application process and introduce startup regulatory sandbox (and remove red tape for SMEs and entrepreneurs)
	Foster innovation and entrepreneurship	39	Upgraded Education Curriculum	Youth engagement, education gap, skills gap	Upgrade primary / secondary curriculum (and introduce programs) for future skills development (innovation, adaptability, problem-solving, empathy, creativity, etc.)
	Become a data intelligence-driven island	40	Smart Visitor Data	Data collection, quality and usage, data vacuum	Monitor visitor behavior and preferences through smart data tracking (e.g., mesh network or beacon)
	Become a data intelligence-driven island	41	Big Data Awareness	Data collection, quality and usage, data vacuum	Introduce Big Data awareness and training for stakeholders (workshops, practice sharing)
	Enhance digital communication and facilitate knowledge-sharing	42	Destination Development Dashboard	Alignment, measurement, visitor footprint	Develop membership based platform for sharing tourism business intelligence, travel trends, consumer trends, and for communicating with stakeholders in other sectors, and entrepreneurs
	Enhance digital communication and facilitate knowledge-sharing	43	Digitization National Archives	DNA perception, awareness, information availability	Digitize national archives for conservation of culture and heritage

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PLAN	IMPACT	LEAD	A.T.A. ROLE	STRATEGIC PARTNERS**	*** TIMING
Sub-brand regulatory	Enhanced sense of place and pride of place, greater alignment with brand promise	GOA	Advocacy	DIP, DOW, MBA, SMFA, ANA, architects, interior designers	Q1 - Q4 2018
Application, mens to and	Stimulates entrepreneurship, fosters SME growth	DEZHI	Advocacy	KVK, ATIA, GOA, BI, ATECH, private sector, entrepreneurial organizations	Q1 - Q4 2018
Primary school after-school (tech, problem-solving,	Future-proof education, encourages an entrepreneurial mindset, reduced skills gap	Department of Education	Advocacy	KVK, ATIA, GOA, BI, ATECH, private sector, entrepreneurs organizations	Q1 - Q4 2018
Real-time (technology cans)	Smart data collection of visitor behavior, preservation of leadership position in travel innovation	A.T.A.	Lead	AAA, APA, GOA, communication partners, private sector	Q3 2017- Q4 2018
Business program ops and best	Enhanced tracking, knowledge and usage of visitor data	AIB	Partner	CBA, SMEs, KVK, ATIA, CBS, entrepreneurs organizations	Q4 2017 - Q4 2018
and (digital) m data, ller and	Collaboration, increased data accuracy, enhanced communication, data-driven decisions	A.T.A.	Lead	GOA, NGO, private sector	Q1 - Q4 2018
holders, eneurs	Increased awareness, access to accurate information, facilitates storytelling	BNA	Advocacy	DCA, SDG, ANA, GOA, TCH, private sector	Q1 - Q4 2018



Actions kicking off in 2017 and 2018

PHASE 1

STRATEGIC OBJECTIVES	DEVELOPMENT PRIORITY	#	ACTION*	KEY ISSUES	ACTION GAME
Increase community engagement   	Increase awareness of sustainable tourism and product	44	Sustainability Awareness Plan	Integration, awareness, collaboration	Develop island-wide tourism sustainability awareness plan
	Strengthen alignment between communication and visitor expectation	45	Content as a Service (CAAS) Platform	DNA perception, cliché, authenticity, regional competitiveness, awareness	Grant access to membership platform for sharing best practices, communication, information for visitors, branding (e.g., for focus), and downloadable local toolkit
	Activate local and international ambassadors	46	District Awareness	Social cohesion, awareness, sustainability mindset, enforcement	Create interactive platform and information touch points for awareness of sustainable tourism and enhancement of pride of place in districts
	Enhance on-island communication (B2C)	47	Information Touch Points	Sense of place	Activate visitor information touchpoints (human / digital) on island
	Enhance on-island communication (B2C)	48	Storytelling	Sense of place	Promote storytelling through campaigns, mobile app and key points of interest (e.g., visual guide narrating the stories of each Mirador and DNA amp stories throughout key landscape

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PLAN	IMPACT	LEAD	A.T.A. ROLE	STRATEGIC PARTNERS**	*** TIMING
Plan	Increased sustainability mindset, communication alignment	A.T.A.	Lead	SDG	Q3 2017 (annually in Q3)
Plan based on target niches of branding	DNA - brand alignment, cohesive communication, greater alignment with visitor expectation	A.T.A.	Lead	ACP, AHATA, Experience Providers, Private sectors, NGO.	Q2 - Q4 2018
Plan and local place in	Increased community engagement, enhanced pride of place	A.T.A. / SDG	Partner	SDG, MFA, NGOs, district leaders	Q1 2018- Q3 2018 (ongoing / annually in Q3)
Plan centers or (al) across the	Connection of people and place, enhanced visitor experience	A.T.A.	Lead	MFA, CDB, district leaders, local community	Q3 2017 - Q4 2018
Plan through online audio and history behind (marks)	Connection of people and place, enhanced visitor experience	A.T.A.	Lead	ANA, SMFA, MBA, DCA, BNA, entrepreneurs, historians, experience providers	Q1 - Q4 2018



Actions kicking off in 2019

PHASE 2

STRATEGIC OBJECTIVE	DEVELOPMENT PRIORITY	#	ACTION*	KEY ISSUES	ACTION G
Amplify sense of place					
	Beautify physical surroundings	49	Infrastructure Authenticity Guidelines	Brand perception, authenticity	Advocate infrastructure alignment and strengthen regulatory framework to support alignment
	Beautify physical surroundings	50	Beautification think-tank - Infrastructure Toolkit	Visitor expectation, sense of place, authenticity, DNA perception, heritage conservation	Phase 1: Set up platform for best practice guidelines for public works and create DNA alignment beautification plan
	Beautify physical surroundings	51	Beautification think-tank - Creative Session	Visitor expectation, fragmented experience, sense of place, authenticity, tired product	Phase 2: Host creative collaborative development create a robust first product with the Aruba brand visibility points, e.g., taxi and along the airport
	Beautify physical surroundings	52	Infrastructure Upgrade Plan	Sense of place, authenticity, visitor expectation, quality and value of product	Implement infrastructure (ticket items) and development presented by Beautification
	Increase presence and visibility of DNA in destination	53	Culinary Identity	Sense of place, cultural identity, authenticity, awareness	Develop authentic culinary program: workshops for community and chefs (practical course where Aruba share tips and restaurants, kitchens,
	Increase presence and visibility of DNA in destination	54	Local Produce and Farming	Visitor expectation, sense of place, authenticity, sustainability	Encourage local produce farming and farm to table (pop-ups) through awards and tax incentives for
	Increase presence and visibility of DNA in destination	55	Education (Urban) Farmers	Visitor expectation, sense of place, authenticity, sustainability, awareness	Introduce online platform of local traditional farmers (e.g., 'how to' tutorials for local produce tracking and database for local farmers)



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NAME PLAN	IMPACT	LEAD	A.T.A. ROLE	STRATEGIC PARTNERS**	*** TIMING
Aruba brand strengthening of (ROP and ROPV)	Enhanced sense of place and pride of place, greater brand alignment	GOA	Advocacy	DIP, DOW, MBA, SMFA, ANA, architects, interior designers	Q1 - Q4 2019
Form and develop (do's and don'ts) private assets, and infrastructure	Increased awareness and placement of authentic (DNA) elements	Infrastructure Team	Partner	DCA, GOA, DIP, DOW, KVK, APA, AAA, MBA, ANA, local community, architects, interior designers	Q1 - Q2 2019
Session for placement of designs to point of contact at high visitor the airport, port - hotel route	Enhanced connection of people and place through DNA visibility at primary points of interest, conservation of heritage	GOA	Partner	DCA, GOA, DIP, KVK, DEZHI, FMA, APA, AAA, local community, architects, interior designers	Q1 2019 - Q4 2022
Structure upgrades (big loop plan) location think-tank	Enhanced sense of place, higher quality product	PPP	Advocacy	GOA, DIP, APA, AAA, OBID, San Nicolas associations, local community, architects, interior designers, private sector	Q1 2019 - Q4 2019
Culinary awareness for culinary competition, the best chefs of tricks with local and food trucks	Amplified culinary identity, instills pride for local cuisine, connects people and place	A.T.A.	Lead	AGA, EPI Hospitality, F&B sector, local chefs	Q1 - Q4 2019
Local produce (urban) concepts (or awareness campaign local produce)	Protection of culinary traditions, enhanced product quality and value, encourages a sustainability mindset	GOA / Santa Rosa	Advocacy	AGA, DCA, EPI Hospitality, AHATA, DIMP, private sector, local chefs	Q1 - Q4 2019
Form for education farmers and urban grow video products, inventory / marketplace for niche market	Protection of culinary traditions, enhanced product quality and value, encourages a sustainability mindset, increased economic value of niche market	Santa Rosa	Advocacy	AGA, Santa Rosa, DCA, DLVV, private sector, local chefs	Q1 - Q4 2019



Actions kicking off in 2019

PHASE 2

STRATEGIC OBJECTIVE	DEVELOPMENT PRIORITY	#	ACTION*	KEY ISSUES	ACTION GAME
	Increase presence and visibility of DNA in destination	56	Culinary Identity - Video Series	Sense of place, cultural identity, authenticity, awareness	Culinary identity awareness Produce quarterly video series and visitors with inspiration, e.g., where to eat a specific ACP dish, make at home recipes curated by a chef or a grandparent)
	Increase awareness of culture and heritage	57	Authentic Arts and Crafts	Consistency, authenticity, local offering	Enhance marketing communication for local arts and crafts, offering unique experiences

Balanced Development

	Protect and enhance cultural and natural assets	58	Preventive Training Program	Awareness, enforcement	Develop and facilitate (ACP) program for customs, police, immigration, and border patrol to prevent illegal trade of protected species (and is dissemination to local community)
	Protect and enhance cultural and natural assets	59	Community Awareness	Knowledge of culture and heritage, misrepresentation	Leverage ACP culture and heritage curriculum for island-wide education Develop aggregator website series + downloadable toolkits for nights that anyone can host
	Maintain socio-economic balance	60	Environmental Awareness	Illegal dumping, waste management, sustainability awareness, carbon footprint	Develop environmental awareness program for the tourism industry Reduce use of plastic, waste disposal Promote green certifications, and eco-friendly use

Develop an Innovation mindset

	Foster innovation and entrepreneurship	61	Design Platform	Design quality, communication consistency	Develop best practice guide and learning platform for digital marketing
	Foster innovation and entrepreneurship	62	Entrepreneurship Incubator	Funding and guidance, innovation and entrepreneurship bottlenecks	Set up incubator: A program of structured mentorship and support for entrepreneurs for developing innovative products and services
	Foster innovation and entrepreneurship	63	Strategic Innovation Fund	Funding, Innovation and entrepreneurship bottlenecks	Establish a Strategic Innovation Fund to facilitate funding for startups and entrepreneurs and (small) businesses through a program for innovative product development



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PLAN	IMPACT	LEAD	A.T.A. ROLE	STRATEGIC PARTNERS**	*** TIMING
...s program: ...ries for locals ...n and tips (e. ...ruban dish, ...nted by a local	Amplified culinary identity, connects people and place	A.T.A.	Lead	AGA, EPI Hospitali- ty, local chefs	Q3 2019 - Q1 2020
...unication of ...ngs, and	Culture preservation, encourages creative expression, increased visitor spending	A.T.A. / Cose- cha	Partner	FMA, DCA, experience providers	Q1 - Q4 2019
...y training ...e, ...ontrol for the ...awareness ...land-wide ...munity) ...eritage ...campaign, ...e and video ...kit for trivia ...t ...areness ...dustry, incl. ...sial, recycling, ...efficient energy	Increased (community) awareness, enhanced protection of biodiversity	Ministry of Justice	Advocacy	KPA, Douane, SMEs, NGOs	Q1 - Q4 2019
	Increased competitiveness, culture preservation, increased awareness of product	A.T.A. / ACP	Partner	DCA, GOA, private secto	Q1 - Q4 2019
	Increased awareness for environmental footprint	GOA	Advocacy	SDG, AHATA	Q1 - Q4 2019
...elines and ...il design	Enhanced communication, brand alignment	A.T.A.	Partner	KVK, ATIA, private sector, entrepre- neurs	Q1 - Q4 2019
...m that offers ...l training for ...ment of ...ervices	Encourages entrepreneurship and open innovation, maintenance of pioneering position, stimulates knowledge economy	AIB	Partner	ABA, AIB, CBA, Strategic Innovation Fund Team, BI, ATECH, UOA, DEZHI, pri- vate sector	Q1 - Q4 2019
...ation Fund to ...ps and ...grant ...duct	Encourages entrepreneurship and open innovation, pioneering position, stimulates knowledge economy	AIB	Partner	ABA, AIB, CBA, DIMP, DEZHI, private sector	Q1 - Q4 2019



Actions kicking off in 2019

PHASE 2

STRATEGIC OBJECTIVE	DEVELOPMENT PRIORITY	#	ACTION*	KEY ISSUES	ACTION GAME
Increase community engagement					
	Increase awareness of sustainable tourism and product	64	Voluntourism Platform	Social cohesion, awareness, sustainability mindset	Create informative platform sustainable tourism volunt opportunities and digital d NGOs (stichtingen)
	Increase awareness of sustainable tourism and product	65	Youth Awareness	Social cohesion, awareness, sustainability mind-set, enforcement	Host island-wide competi schools to stimulate creati raise awareness for sustain (tourism) efforts and work field trips for interactive le.
	Increase awareness of sustainable tourism and product	66	Happiness Index Awareness	Social cohesion, awareness, sustainability mindset, education	Increase awareness of Hap (quality of life) indicators w community and stakeholde
	Facilitate learning about tourism product and aspiration	67	Mobile Knowledge Center	Social cohesion, awareness, sustainability mindset, education	Activate mobile knowledge for sustainable tourism. Le Mobile Tech Lab (rotate aft programs, community cent
	Activate local and international ambassadors	68	Civic Participation	Social cohesion, awareness	Introduce program to prom participation through volu opportunities via stories (s series), to reach both local and visitors
Increase the economic value of tourism					
	Enhance quality of product	69	Destination Competitive-ness Analysis	Value for money, competition	Update competitiveness / p benchmark study to assess destination's perceived val with (potential) visitors and opportunities for growth
	Enhance quality of product	70	Experience offering, visitor expectation	Experience offering, visitor expectation	Renew product and progr restaurants, retail experier activities and other immer experiences) for alignment Aruba brand and niche roa
	Enhance quality of product	71	Hotel Product Upgrade Policy	Business and invest-ment climate, mature product	Revisit IPC tax regime, intr investor and/or re-investm incentives. Remove red tap investment in hotel proper renovations and upgrades



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PLAN	IMPACT	LEAD	A.T.A. ROLE	STRATEGIC PARTNERS**	*** TIMING
on Tourism Database of	Ward of mouth, opens up new visitor market, activates local and international ambassadors	Incubator	Partner	NGOs, SDG, Aruba Daet, Cede	Q1 - Q4 2019
on for ive ideas to table shops / arning	Enhanced pride of place, fosters creative confidence, encourages a sustainability mindset	Department of Education	Partner	SDG, NGOs, AHATA, ATSA, Curriculum Ontwikkeling	Q1 2019 - Q4 2020
Business Index with ers	Activates local ambassadors, increased awareness	A.T.A.	Lead	GOA, SDG, MFA, AHATA, ATSA, AGA, ATIA, KVK, UOA, district leaders	Q2 - Q3 2019
center (bus) verage er-schaal ers and MFA)	Increased community and youth engagement, increased awareness and social capital	BI	Partner	SDG, MFA, UOA, Department of Education, Curriculum Ontwikkeling, district leaders	Q1 - Q3 2019
note civic ntering hart video community	Connects people and place, community engagement, word of mouth, opens up new visitor markets	AHATA	Partner	NGOs, ATSA, AGA, experience providers	Q1 - Q4 2019
ricing the ue for money d identify	Regional benchmark, monitoring of visitor perception and needs, increased competitiveness	A.T.A.	Lead	AHATA, AAA, CBS, CBA	Q1 - Q2 2019
mming (e.g., nce, (niche) sive with the d map	Brand alignment, greater alignment with visitor expectation, enhanced sense of place, cohesive experience	A.T.A.	Lead	AGA, OBID, Incubator, San Nicolas associations, retail sector, experience providers	Q1 - Q4 2019
duce ent of profits e to facilitate ty	Upgraded hotel product, increased quality and value of accommodation, greater alignment with visitor expectation	GOA	Advocacy	Arina, DIMP, CBA, ABA, AHATA, AVBA, entrepreneurs organizations	Q1 - Q4 2019



Actions kicking off in 2019

PHASE 2

STRATEGIC OBJECTIVE	DEVELOPMENT PRIORITY	#	ACTION*	KEY ISSUES	ACTION GAME
	Enhance quality of product	72	Quality Control	Product consistency and quality, tax collection	Institute dedicated quality for monitoring of registered and unregistered alternative accommodations for adherence to industry standards and tax
	Enhance quality on island experience	73	Sharing Economy Strategy	Visitor experience, quality control, tax compliance	Develop future sharing economy tourism strategy to enhance visitor experience and identify opportunities for growth and new product experience development
	Enhance quality on island experience	74	Experiential Workshops and Brand Toolkits	Brand perception, brand misalignment, experience quality, authenticity, awareness	Host workshops and create toolkits for development of and memorable experiences aligned with the Aruba brand communication thereof
	Develop niche markets	75	Marriage License Application	Innovation, visitor experience	Introduce on-demand application service for visitors that allows for processing of marriage licenses
	Develop niche markets	76	Weddings Policy	Innovation, visitor experience and awareness	Update legal framework for make issuance of marriage ceremonies location independent introduce policy that facilitates unions (or similar agreements) pending amendment of legal framework
	Develop niche markets	77	Unesco Creative Cities	Sense of place, visitor experience and awareness	Apply for Unesco's Creative Network by 2020 (San Nicolas Oranjestad)
	Safeguard and enhance hospitality	78	Youth Engagement	Youth interest in tourism, skills gap	Offer learning and incentives by/for hotel partners to encourage investment in human capital engagement
	Safeguard and enhance hospitality	79	Human Capital Development	Skills gap, aging labor force, industry performance, demand and supply	Provide continuous general leadership training and skills development program (including for hospitality students, teachers, hotel industry labor force



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PLAN	IMPACT	LEAD	A.T.A. ROLE	STRATEGIC PARTNERS**	*** TIMING
Control team and	Level playing field, product quality monitoring, quality data, enhanced tax collection	GOA	Partner	DIMP, DEZHI, AHATA, CBS	Q1 - Q4 2019
Enhance with compliance	Quality assurance, delivery on brand promise, alignment in destination management, level playing field	A.T.A.	Lead	GOA, DEZHI, DIMP	Q1 - Q2 2019
Enable digital authentic experiences that are and	Brand - experience and communication alignment, greater alignment with visitor expectation, authentic and memorable experiences Facilitates romance niche, removes roadblocks on path to purchase, enhanced visitor experience, maintained leadership position in innovation	A.T.A.	Lead	ARA, KVK, ATIA, AHATA, ATSA, AGA, IDEA, DEZHI	Q1 - Q4 2019
Facilitation (shows online response)		Censo	Partner	Censa, wedding planners	Q1 - Q3 2019
For weddings to license and (enables same sex events) legislative	Opens up a new market of high-spenders, enhanced visitor experience	GOA / Censo	Advocacy	DWJZ, NGOs, Censa	Q1 - Q4 2019
Enable Cities (class and/or	Sustainable urban development, strengthens competitive advantage, fosters creativity	A.T.A.	Lead	DEZHI, DCA, SDG	Q3 - Q4 2019
Enable program (encourages cultural and youth	Increased youth engagement, talent development	AHATA	Partner	Department of Education, DIMP, GOA, RVK, Curriculum Ontwikkeling, ACP, summer camp suppliers	Q1 2019 - Q4 2020
Enable (and (in languages) teachers and	Increased quality of service, enhanced performance and productivity	AHATA	Partner	Department of Education, GOA, Curriculum Ontwikkeling, ACP, EPI Hospitality, UOA	Q1 2019 - Q4 2020



Actions kicking off in 2019

PHASE 2

STRATEGIC OBJECTIVE	DEVELOPMENT PRIORITY	#	ACTION*	KEY ISSUES	ACTION GAME
	Safeguard and enhance hospitality	80	Employee Benefits Program	Productivity, flexibility	Develop flexible work and programs and joined facilities or after-school care programs for labor force
	Safeguard and enhance hospitality	81	ACP Learning Vault	Hospitality, service quality, product knowledge	Develop a digital platform for continuous learning
	Remove bottlenecks on path to purchase	82	On-Demand Taxi	Innovation bottleneck, visitor expectation	Encourage development of taxi booking app(s)
	Enhance quality of product	83	Accessibility Policy	Facilities for special needs, enforcement	Revisit and enforce policy / encourage infrastructural constructions to meet accessibility standards



* *Actions listed are clustered by Strategic Objective and Development Priority. The action numbers do not follow a timeline sequence.*

** *Refer to page 80 for a list of acronyms and abbreviations used in the plan.*

*** *Refer to pages 116-131 for a visual timeline of the action plan.*

PLAN	IMPACT	LEAD	A.T.A. ROLE	STRATEGIC PARTNERS**	*** TIMING
Wellness y for childcare ms for hotel	Work-life balance, enhanced performance	AHATA	Partner	ATSA	Q1 2019 - Q4 2020
(through ACP)	Talent development, improved service quality, higher customer satisfaction, maintained leading hospitality position	A.T.A. / ACP	Lead	GOA, NGOs, private sector	Q1 2019 - Q1 2020
on-demand	Stimulates entrepreneurship and open innovation, seamless visitor experience, higher visitor spending, meets new traveler demands	Entrepreneurs	Advocacy	Entrepreneurs organizations, private sector, taxi associations	Q1 - Q4 2019
legislation to upgrades and ssibility	Enhanced on-island accessibility, enhanced visitor experience	DOW	Advocacy	GOA, DIP, DEZHI, private sector	Q1 - Q4 2019



Actions kicking off in 2020 and 2021

PHASE 3

STRATEGIC OBJECTIVE	DEVELOPMENT PRIORITY	#	ACTION*	KEY ISSUES	ACTION GAME
Amplify sense of place					
	Increase awareness of culture and heritage	84	Tourism Liaison	Cultural identity, authenticity, awareness, representation, sense of place	Assign a dedicated individual and create linkages between tourism, and assist in product development
	Beautify physical surroundings	85	Vista Restoration	Crowded, touristy, visual pollution / clutter	Ban or discourage the placement of billboards / media or structurally significant public and private areas
	Beautify physical surroundings	86	Public Works Enhancement	Sense of place, authenticity, product quality	Enhance aesthetics of public spaces, rename or brand streets and landmarks, enhance visibility Aruba Districts or information signs, public art, signage, bus stops, parking meters (plates)
Balanced Development					
	Bring awareness to sustainable tourism	87	Kids Gamification Program	Youth interest, culture awareness	Develop interactive learning activities for kids on culture and heritage island-wide through social media and districts
	Bring awareness to sustainable tourism	88	Cultural Field trip	Youth interest, culture awareness	Organize (semi-) annual cultural field trip month for primary and secondary schools and broader community in partnership with Curriculum Ontwikkelingsraad
Develop an Innovation Mindset					
	Foster innovation and entrepreneurship	89	Innovation District	Absence of center of gravity, lack of practical incentives, visibility	Develop and brand a designated (strategically) area as Innovation District, conduct a feasibility assessment of potential areas (e.g., Oranjestad) and re-purposing of unused spaces
	Foster innovation and entrepreneurship	90	Shoco Innovation Award	Lack of innovation	Introduce innovation awards, Shoco Awards program for private sector and (startup) entrepreneurs

- * *Actions listed are clustered by Strategic Objective and Development Priority. The action numbers do not follow a timeline sequence.*
- ** *Refer to page 80 for a list of acronyms and abbreviations used in the plan.*
- *** *Refer to pages 116-131 for a visual timeline of the action plan.*

PLAN	IMPACT	LEAD	A.T.A. ROLE	STRATEGIC PARTNERS**	TIMING
Plan to identify and promote local culture and product development	Increased awareness, consistent communication	DCA	Advocacy	GOA	Q1 - Q4 2020
Management of large structures in deserts and/or	Limits visual pollution, preserves scenic views and natural beauty, enhanced sense of place, higher quality product	GOA	Advocacy	DIP, DOW	Q1 - Q4 2021
Public works (e.g., and/or areas, signage) on direction of transportation, car license	Enhanced sense of place, higher quality product, consistency	GOA	Advocacy	GOA, DIP, DOW, local community	Q1 - Q4 2021
Enhancing experience for youth. Disseminate through media, schools	Increased youth engagement, investment in the future	Department of Education	Partner	FMA, DCA, ACP, RVK, GOA	Q1 2020 - Q3 2022
Cultural field trip for secondary schools in collaboration with marketing team	Increased youth engagement, investment in the future	A.T.A. / ACP	Advocacy	Department of Education, DCA, BNA	Q1 - Q4 2020
Developed (concentrated) District. Under consideration to consider (re)development, APA area) and real estate	Encourages entrepreneurship and open innovation, pioneering position, stimulates knowledge economy, opens up new visitor markets	DEZHI	Advocacy	GOA, DIP, ATIA, KVK, BI, ATECH, APA, DIMP, private sector, entrepreneurs organizations	Q1 - Q4 2020
Developed under the leadership of the tourism entrepreneurs	Encourages entrepreneurship and open innovation, maintained pioneering position, stimulates private sector innovation	AHATA	Partner	Private sector	Q1 - Q4 2020



Actions kicking off in 2020 and 2021

PHASE 3

STRATEGIC OBJECTIVE	DEVELOPMENT PRIORITY	#	ACTION*	KEY ISSUES	ACTION GAME
	Data intelligence-driven island	91	Smart Tourism Sandbox	Collaborative (open) innovation, data vacuum	Introduce incentives and launch tourism product R&D (e.g., machine learning, block chain things), incl. beta testing for API platform
Increase Community Engagement					
	Enhance on-island communication (B2C)	92	Re-imagined Aruba Convention Bureau	DNA perception, authenticity, regional competitiveness, sense of place, lack of innovation	Redesign Aruba Convention page into an interactive experience tailored to specific event segments (segment with Aruba brand). Add segments linked to target v

- * *Actions listed are clustered by Strategic Objective and Development Priority. The action numbers do not follow a timeline sequence.*
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- *** *Refer to pages 116-131 for a visual timeline of the action plan.*

PLAN	IMPACT	LEAD	A.T.A. ROLE	STRATEGIC PARTNERS**	TIMING
<p>Plan for smart big data, machine learning, internet of things leveraging A.T.A.'s</p>	<p>Leading position as innovation epicenter, supports knowledge economy, fosters entrepreneurship, opens up new visitor markets</p>	<p>Incubator</p>	<p>Partner</p>	<p>GOA, CBS, DEA, DIP, entrepreneurs organizations, private sector, communication partners</p>	<p>Q1 2020 - Q1 2021</p>
<p>Enhance Bureau's web-experience tailors content (in alignment) to simplify market for visitors / niches</p>	<p>Expand market reach (incl. retreats, summits), innovation and modernization of existing assets, increased competitive advantage</p>	<p>A.T.A.</p>	<p>Lead</p>	<p>GOA, KVK, private sector, event planners</p>	<p>Q1 - Q4 2020</p>



Actions kicking off in 2017 and 2018

TIMELINE

#	DDP Actions	2017 Q2	2017 Q3
23	<i>Relaunch Mi Campramisa</i>	██████████	
17	<i>Aruba Seal*</i>	██████████	
3	<i>Advacacy Agenda**</i>		██████████
44	<i>Sustainability Awareness Plan**</i>		██████████
4	<i>Sustainable Tourism Do's and Don'ts</i>		██████████
5	<i>Code of Conduct</i>		██████████
6	<i>Safety and Security Standards</i>		██████████
1	<i>Carrying Capacity Review</i>		██████████
19	<i>Communication Strategy and Niche Road Map</i>		██████████
20	<i>Digital Payments - Infrastructure</i>		██████████
40	<i>Smart Visitor Data</i>		██████████
2	<i>Watchdog Platform</i>		██████████
8	<i>Sustainable Tourism Curriculum</i>		██████████
24	<i>Language Classes</i>		██████████
29	<i>Cultural Heritage Capital</i>		██████████
47	<i>Information Touch Points</i>		██████████
34	<i>Experiential Lab - Toolkits</i>		██████████
13	<i>Wildlife Protection</i>		██████████



Actions kicking off in 2017 and 2018

TIMELINE

#	DDP Actions	2017 Q2	2017 Q3
25	<i>ACP Expansion</i>		
30	<i>Free WIFI</i>		
41	<i>Big Data Awareness</i>		
33	<i>Accessibility Policy</i>		
46	<i>District Awareness***</i>		
7	<i>Urban Planning Council</i>		
9	<i>Safety Awareness Campaign</i>		
10	<i>Curb an Salicitatian</i>		
11	<i>Taurism Palicing</i>		
12	<i>Incident Reporting Platform</i>		
14	<i>Beach and Ocean Policy</i>		
15	<i>Marine Park</i>		
18	<i>Tech Enhanced Experiences</i>		
26	<i>Quality Labor Farce</i>		
27	<i>Stricter License Requirement</i>		
32	<i>Place-making Strategy</i>		
35	<i>Visibility and Integration Aruba Brand</i>		
37	<i>Infrastructure Authenticity Guidelines</i>		



Actions kicking off in 2017 and 2018

TIMELINE

#	DDP Actions	2017 Q2	2017 Q3
38	<i>Business License Reform</i>		
39	<i>Upgraded Education Curriculum</i>		
42	<i>Destination Development Doshboord</i>		
43	<i>Digitization Notionol Archives</i>		
48	<i>Storytelling</i>		
31	<i>Product Dlognostic</i>		
22	<i>On-Demand Economy</i>		
21	<i>Digital Payments - Activation</i>		
28	<i>Hospitality Troining - Island Wide</i>		
45	<i>Content as o Service (CAAS) Plotform</i>		
16	<i>Visitor Impact Monitoring</i>		
36	<i>Experiential Lab - Papiemento</i>		



Actions kicking off in 2019

TIMELINE

#

DDP Actions

→ *Continuation of actions that kicked off during Phase 1*

2 *Watchdog Platform*

13 *Wildlife Protection*

14 *Beach and Ocean Policy*

12 *Incident Reporting Platform*

8 *Sustainable Tourism Curriculum*

15 *Morine Park*

22 *On-Demand Economy*

28 *Hospitality Training - Island Wide*

16 *Visitor Impact Monitoring*

3 *Advocacy Agenda***

44 *Sustainability Awareness Plan***

46 *District Awareness****

→ *Actions kicking off in Phase 2*

50 *Beautification think-tank - Infrastructure Toolkit*

69 *Destination Competitiveness Analysis*

73 *Shoring Economy Strategy*

67 *Mobile Knowledge Center*



Actions kicking off in 2019

TIMELINE

#	DDP Actions
75	<i>Marriage License Application</i>
49	<i>Infrastructure Authenticity Guidelines</i>
51	<i>Beautification think-tank - Creative Session</i>
52	<i>Infrastructure Upgrade Plan***</i>
53	<i>Culinary Identity</i>
54	<i>Local Produce and Farming</i>
55	<i>Education (Urban) Farmers</i>
57	<i>Authentic Arts and Crafts</i>
58	<i>Preventive Training Program</i>
59	<i>Community Awareness</i>
60	<i>Environmental Awareness</i>
61	<i>Design Platform</i>
62	<i>Entrepreneurship Incubator</i>
63	<i>Strategic Innovative Fund</i>
64	<i>Voluntourism Platform</i>
65	<i>Youth Awareness</i>
68	<i>Civic Participation</i>
70	<i>Experience Development</i>



Actions kicking off in 2019

TIMELINE

#	DDP Actions
71	<i>Hotel Product Upgrade Policy</i>
72	<i>Quality Control</i>
74	<i>Experiential Workshops and Taalkits</i>
76	<i>Weddings Policy</i>
78	<i>Youth Engagement</i>
79	<i>Human Capital Development</i>
80	<i>Employee Benefits Program</i>
81	<i>ACP Learning Vault</i>
82	<i>On-Demand Taxi</i>
83	<i>Accessibility Policy</i>
66	<i>Happiness Index Awareness</i>
56	<i>Culinary Identity - Video Series</i>
77	<i>Unesca Creative Cities</i>



Actions kicking off in 2020 and 2021

TIMELINE

#	DDP Actions	2020 Q1	2020 Q2
→ Continuation of actions that kicked off during Phase 1			
8	Sustainable Tourism Curriculum	[Progress bar]	
15	Marine Park	[Progress bar]	
3	Advocacy Agenda**	[Progress bar]	
44	Sustainability Awareness Plan**	[Progress bar]	
46	District Awareness*/**	[Progress bar]	
→ Continuation of actions that kicked off during Phase 2			
52	Infrastructure Upgrade Plan***	[Progress bar]	
65	Youth Awareness	[Progress bar]	
78	Youth Engagement	[Progress bar]	
79	Human Capital Development	[Progress bar]	
80	Employee Benefits Program	[Progress bar]	
81	ACP Learning Vault	[Progress bar]	
56	Culinary Identity - Video Series	[Progress bar]	
→ Actions kicking off in Phase 3			
84	Tourism Liaison	[Progress bar]	
87	Kids Gamification Program***	[Progress bar]	
88	Cultural Field trip	[Progress bar]	



- * Ongoing
- ** Set annually in Q3
- *** Long term project through 2022

2020 Q3	2020 Q4	2021 Q1	2021 Q2	2021 Q3	2021 Q4
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Actions kicking off in 2020 and 2021

TIMELINE

#	DDP Actions	2020 Q1	2020 Q2
89	<i>Innovation District</i>		
90	<i>Shaca Innovation Award</i>		
91	<i>Smart Tourism Sandbox</i>		
92	<i>Re-imagined Aruba Convention Bureau</i>		
85	<i>Vista Restoration</i>		
86	<i>Public Works Enhancement</i>		



- * Ongoing
- ** Set annually in Q3
- *** Long term project through 2022

2020 Q3	2020 Q4	2021 Q1	2021 Q2	2021 Q3	2021 Q4
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A destination development plan for Aruba



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